Janice P. Williams, P.E. Chief, Project Development Division LA DOTD November 28, 2012 Revised 12-21-12





# Right of Way Consultant Selection Workshop













## Right of Way Consultant Selection Workshop

### **Constitution of the United States of America Amendment XIV**

Section 1.

All persons born or naturalized in the United States, and subject to the jurisdiction thereof, are citizens of the United States and of the state wherein they reside. No state shall make or enforce any law which shall abridge the privileges or immunities of citizens of the United States; nor shall any state deprive any person of life, liberty, or property, without due process of law; nor deny to any person within its jurisdiction the equal protection of the laws.





### The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (Uniform Act)

The Uniform Act, provides important protections and assistance for people affected by Federally funded projects. This law was enacted by Congress to ensure that people whose real property is acquired, or who move as a result of projects receiving Federal funds, will be treated fairly and equitably and will receive assistance in moving from the property they occupy.

www.FHWA.dot.gov





## Right of Way Consultant Selection Workshop

#### **Outline**

- DOTD Consultant Selection Process
- Standard Form DOTD 23-116
- Task Order Assignment Process
- Questions/Answers





#### **DOTD Consultant Selection Process**

- Louisiana RS 48: 285-294
- Qualifications based selection
- 5 person evaluation team (DOTD staff)
- •3 firm shortlist
- Secretary makes final selection





## Right of Way Consultant Selection Workshop

#### **DOTD Consultant Selection Process**

The general criteria and weighting factors per RS 48:293

- (a) Experience, both firm and key staff personnel, factors of three and four respectively.
- (b) Past performance on DOTD projects, factor of six.
- (c) Current work load, factor of five.
- (d) Firm size as related to project magnitude, factor of three.
- (e) Location where work will be performed, factor of four
- (f) Any special evaluation criteria specified in the advertisement required to meet particular project needs.





#### **DOTD Consultant Selection Process**

- •General criteria and weighting factors per RS 48:293 can be modified as determined by DOTD.
- Modifications will be stated in the advertisement
- For example: Appraisal retainer contracts have neutralized the location and firm size factors





## Right of Way Consultant Selection Workshop

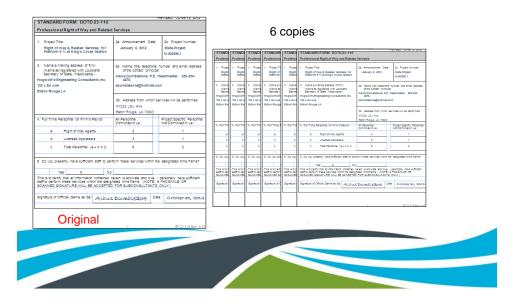
DOTD 23-116 Instructions

One ORIGINAL (**Stamped "Original"**) and **six (6)** copies of the SF 23-116 are required

•One copy of submittal must be clearly marked "Original"









## Right of Way Consultant Selection Workshop

**DOTD 23-116** 

Part 1. Project Title
Insert exact name of services/project from
advertisement

Part 2. Announcement date

Date the announcement appeared on the website

Date of addendum (if any)





#### **DOTD 23-116**

#### Part 3. Project number

- List all project numbers, contract number or other reference number as shown in ad
- You can only be considered for the project/contract number you list





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#### Correct

CONTRACT NOS. 4400003401, 440003402, 4400003403, 4400003404, 4400003406, 4400003407, 4400003408, 4400003409, 4400003410, 4400003421, 4400003422, 4400003423, 4400003424, 4400003425, 4400003426, 4400003427, 4400003428, 4400003429, 4400003430, 4400003431, 4400003432, 4400003433, 4400003434, 4400003435, 4400003436, 4400003437, 4400003438, 4400003439, 4400003440, 4400003441, 4400003442, 4400003443, 4400003444, 4400003445, 4400003446, and 4400003447.





#### Correct

"See attached" and attach a separate sheet that lists all pertinent contract numbers

#### Incorrect

CONTRACT NOS. 4400003401, etc.

Or

CONTRACT NOS. 4400003401 through 4400003447.





## Right of Way Consultant Selection Workshop

#### Part 4.

Name & Mailing address of firm:

- Name as registered with Louisiana Secretary of State, if applicable.
- •For sole proprietors, the proposer should be identified by the name that is recognized by the Internal Revenue Service.





# Part 5. Name, title, telephone number and e-mail address of the official with SIGNING AUTHORITY for this contract.

Must be the person who signs in box 8

Part 6. Address from which services will be performed List one address only, either PO Box or street address. Firms with multiple offices should use the office location where the majority of the personnel performing the work on the project are located.





#### Right of Way Consultant Selection Workshop

Part F/T P	7 ersonnel on Firm's Payroll	Project Specific Personnel Not Domiciled in La.:
a.	Right of Way Agents	 
b.	Licensed Appraisers	 
C.	Total Personnel (a + b = c)	 



#### Part 7

- "Domiciled" means your legal place of residence -- not where you work
- Part time or Contract employees should not be included here
- •Contract employees should be shown in Part 10 -- Project Staffing Plan with work experience/qualifications in Part 12.





#### Right of Way Consultant Selection Workshop

#### Part 8

Yes No _	
	lly have sufficient staff to
ACCEPTED FOR SUBCONSU	LTANTS ONLY.)
ACCEPTED FOR SUBCONSU Signature of Official (Same as 5):	Date



Parts 9a and 9b Name/Work Element/Percentage

Prime consultant % in 9a Sub-consultant % in 9b

- •Overall Project work effort is to be divided up between prime and sub-consultant
- •Use name of firms, not individuals from a firm
- •Use a single number not a range
- •The sum of the percentages of 9a + 9b must total 100%





### Right of Way Consultant Selection Workshop

Parts 9a and 9b Name/Work Element/Percentage

- Percentage listed here is used to pro-rate scores between prime and sub
- Type of work listed is used to determine previous performance category





Part 10. PROJECT STAFFING PLAN. Provide an organization chart showing all key prime consultant and sub-consultant (if applicable) personnel assigned to each work element of the project, specific duties for each and immediate supervisors.





## Right of Way Consultant Selection Workshop

Part 10. PROJECT STAFFING PLAN.

Organization chart should clearly show:

- •All key personnel
- Project responsibilities





Part 11. Minimum personnel requirements Identify full-time staff (prime/sub-consultant) designated to work on this project meeting the minimum personnel requirements specified in the advertisement.

- •Entries shall be in the order of the personnel requirements as presented in the advertisement.
- •If multiple personnel are submitted to meet a requirement, all will be evaluated and rated.







### Right of Way Consultant Selection Workshop

Part 12. Provide short resume for key personnel.

- a. Name, Title & Domicile
- b. Name of firm by which employed full time
- c. Years Experience with this firm /with other firms
- d. Education: Degree: /Years: /Specialization
- e. Active registration/Years registered/Branch/ State/License No.
- f. Project Roles/Responsibilities
  What will this person do for this contract?





- 12 g. Experience and qualifications relevant to the proposed project
- Describe experience that qualifies this person to perform the service stated in sub-section 12f
- · Be specific on the experience with similar projects/services
- Use project number when referencing DOTD experience
- · Quantify years performing service
- Identify level of responsibility (eg: manager/supervisor/agent)
- · Relevant Education/Training





### Right of Way Consultant Selection Workshop

Part 12. Key Personnel Resumes Maximum 2 pages per person

Separate Resumes are not acceptable

Must be on Form 23-116

Work experience should show what is relevant to advertisement

Work for DOTD

Work for LA public agency

Work for other State DOT

Work for other public entity

Work for private/commercial interests





#### Part 12 Example:

**H.000001:** US 99 to LA 99: (*January 2001 – December 2002*)
Appraiser for 7 commercial properties, 14 residential parcels and 3 unimproved agricultural parcels

H.000002: DOTD Highway to Intersection of Highway Department Drive: (January 2003 – December 2004)

Review appraiser for 17 commercial properties including 3 convenience stores and 4 restaurants, 25 residential parcels and 3 churches





### Right of Way Consultant Selection Workshop

#### Part 13

- List any past prime or sub-consultant Right of Way Service work performed for DOTD, either directly or indirectly for all of your firm's offices
- •Include work performed for DOTD Legal Section
- •State Project number, F.A.P. number, name, and location





#### Part 14

- List any current prime or sub-consultant Right of Way Service work being performed for DOTD, either directly or indirectly for all of your firm's offices
- •Includes work performed for DOTD Legal Section
- State Project number, F.A.P. number, name, and location
- •For retainer contracts, list open task orders individually





### Right of Way Consultant Selection Workshop

#### Part 14

#### **Contract Details**

- •DOTD Project Manager/Contact Person
- •% Complete and Expected Completion Date
- •Contract fees (in thousand \$) by type of work
- •Take note that this number is in increments of \$1000
- •Example: \$75,000 is shown as \$75 in this form





Instructions for completing Form 23-116:

No. 1. "Do not include anything not specifically requested herein".





## Right of Way Consultant Selection Workshop

Do not include anything not specifically requested herein. Non responsive examples:





No. 2. Submittal must be firmly bound by staples in upper left hand corner; do not use ringed binders or any other type of binding.





## Right of Way Consultant Selection Workshop

No. 2 Submittal must be firmly bound by staples in upper left hand corner; do not use ringed binders or any other type of binding.

If you can't staple it, it is too big.

Non responsive examples: Three ring binders Paper clips







No. 3. Do Not Use Tabs or Section Dividers.





## Right of Way Consultant Selection Workshop

No. 3. Do Not Use Tabs or Section Dividers.

Include only pages which are part of the 23-116 Dividers add bulk without adding value Prime and sub-consultant forms should be bound together











## Right of Way Consultant Selection Workshop

No. 5. Do Not Include Photocopies of Licenses

Advertisement may require licensed professional Signature in Part 8 requires all statements to be true Qualifications are verified prior to award





No. 6. "Do Not Include Marketing Information"





#### Right of Way Consultant Selection Workshop

#### No. 6. Do Not Include Marketing Information

#### Non-responsive:

- •Glossy pages with company history
- •Lists of awards or accomplishments
- •Other information which does not directly address qualifications for specific advertisement





No. 7. Do Not Include Instruction Sheet With Your Submittal.







# Right of Way Consultant Selection Workshop

No. 8. Do not alter the content of this form. (SF-23-116)







No. 8. Do not alter the content of this form. (SF-23-116) Don't change it to make it pretty

#### Responsive:

Box size may be modified to add allow required information to be added

Non responsive: Boxes deleted Format modified





#### Right of Way Consultant Selection Workshop

No. 9. "Do Not Include Photographs."





No. 10. Do not include a cover (front or back).

Covers add bulk without adding value





## Right of Way Consultant Selection Workshop

No. 11. The firm name as it appears on this form and as it appears on any future contract must be identical to the firm name as it appears on the record with the Office of the Louisiana Secretary of State.





No. 12. "The sum of the percentages in item 9a and item 9b should total 100%





## Right of Way Consultant Selection Workshop

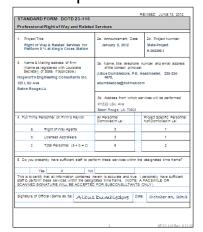
No. 13. "All cells on standard forms required by LA DOTD must be populated with data or N/A."

Do not leave any fields blank. Use actual information or use N/A Use N/A when field is not applicable on first line of table only





No. 14. "Failure to complete this form as instructed will cause proposal to be deemed unresponsive."







#### Right of Way Consultant Selection Workshop

Task Order Assignment Process





#### Task Order Assignment Process

Retainer contracts allow DOTD to have firms on standby Additional procedure needed to assign work Need new approach to ensure even distribution of workload New Competitive Process uses 3 tiered approach





## Right of Way Consultant Selection Workshop

Task Order Assignment Process

Example Appraiser Task Order Assignment

#### **Tier 1 Selection**

- Target: Minimum of 5 appraisers or double the number of appraisers required for the project whichever is larger
- Initial radius of 30 miles
- Increase search in 10- mile increments as needed





#### Task Order Assignment Process

#### **Tier 2 Selection**

#### Availability For Project:

DOTD polls Tier 1 appraiser population regarding their availability

Appraisers respond as available/not available





## Right of Way Consultant Selection Workshop

Task Order Assignment Process

#### Tier 2 Selection

#### Work Outstanding:

Based on number of appraisal reports outstanding Appraiser w/ the least # of reports outstanding scored 4 Appraiser w/ the most # of reports outstanding scored 0 Remaining appraisers scored based on the ratio of high to low





#### Task Order Assignment Process

#### **Tier 2 Selection**

#### Work Orders Issued:

Previous 12 months

Appraiser with the lowest dollar amount scored 4 Appraiser with the highest dollar amount scored 0 Remaining appraisers scored based on ratio of highest dollar amount to lowest dollar amount





## Right of Way Consultant Selection Workshop

Task Order Assignment Process

#### Tier 3 Selection

Uses Short list from Tier 2 Selection Short list will be minimum number needed plus 2

#### **Delivery Schedule:**

Appraiser proposes delivery schedule based on calendar days

Appraiser with shortest duration served scored 4 Appraiser with longest duration served scored 0 Remaining appraisers scored based on ratio of longest to shortest delivery duration



#### Task Order Assignment Process

#### **Tier 3 Selection**

#### Appraisal Experience for Land Use Types:

Reflected in table furnished by DOTD

Number of points is based on number of reports for each land type

One point – 0-25 reports

Two points – 26-40 reports

Three points – 41-60 reports

Four points - 61 and above





## Right of Way Consultant Selection Workshop

#### Task Order Assignment Process

#### **Tier 3 Selection**

#### Past Performance:

Preceding 3 years

Unrated appraisers receive the statewide rating average Rated appraisers receive their average score in the DOTD rating system





Task Order Assignment Process

#### **Tier 3 Selection**

#### Fee Proposal(Optional)

Appraiser with the lowest price scored 4
Appraiser with the highest price scored 0
Remaining appraisers scored based on ratio of highest price to lowest price





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